



Department of the Treasury
Internal Revenue Service

The Business Case for *e-file*, a Panel Discussion with Tax Professionals

The Business Case for *e-file*

Administrative Details

- Session will be recorded and available at IRS.gov
- Certificates for CPE will be available
- Questions can be emailed through link under “Questions About the Presentation”
- For technical difficulties, call (800) 717-2821

The Business Case for *e-file* – *Texas*

Introduction of Panelists

- Chuck Burch, CPA
- S. Dean Saul, EA
- Carmen Garza, Tax Pro

The Business Case for *e-file* – Texas

Facts about *e-file*

- Program launched in 1986
- Congressional goal of 80% returns filed electronically
- 94 million returns filed electronically in 2009
- 60 million - 65% - filed by tax professionals

The Business Case for *e-file* – Texas

About our panelists

- Chuck Burch

- President, Burch Financial Group.
- 25 years experience.
- Speaker, consultant, subject matter expert on emerging business issues.

- S. Dean Saul

- National Practice Institute Fellow.
- Tax practitioner since 1969.
- Nationally recognized tax speaker.

- Carmen Garza

- Founder and manager of North Iredell Records, Inc. in Union Grove, NC.
- Nearly 40 years tax experience.
- Vice President of the North Carolina Society of Tax Professionals.

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Questions for panelists

- What compelled you to go with *e-file*?
- How did you make the switch to *e-file*?
- What has using *e-file* done for your business?
- How did you handled objections, within your company or from your clients, when you switched to e-file?
- What objections have you heard from other professionals, and how would you respond to those objections?

Questions from Participants

Click on link under “Questions About the Presentation”

The Business Case for *e-file*

Reminders

- Session will be available at IRS.gov
- Certificates for CPE will be emailed for live event
- Survey will be sent for your feedback
- For additional resources, visit www.irs.gov/taxpros
- Thanks to panelists and to all participants

The Business Case for *e-file*

Summary about *e-file*

- Easy to use
- Majority of tax professionals use it
- Saves time
- Saves money
- Safe and secure
- More and more clients request it



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